

Retention and Classification Report

Agency: Department of Workforce Services. Panguitch Employment
Center (1903)
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Records Officer Amanda McPeck

07066 Eligibility case files
07302 Home energy assistance target program case files

AGENCY: Department of Workforce Services. Panguitch Employment Center

SERIES: 7066

3

TITLE: Eligibility case files

DATES: 1976-

ARRANGEMENT: Alphabetical by client surname

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These files document complete case histories of clients receiving services provided in or through a social services office (OSS). Programs are funded by the Division of Family Services (DFS), Services to the Handicapped (DSH), State Office of Social Services (OSS), Aging and Adult Services (DAAS), and/or local discretionary funds. Two regions also carry programs for the Division of Mental Health (DMH), and the Division of Alcoholism and Drugs (DAD). The following record series are not included: adoptions (including interstate compact adoptions), foster care and interstate foster care files, substantiated and unsubstantiated child abuse/neglect files, the central register, ombudsman case files (elderly abuse), adult abuse case files, adult abuse central register, licensing files, all Training School and State Hospital Files. Client case files include but are not limited to the following types of eligibility and determination forms: Application for Financial, and Medical; Application for Social Services; Request for Expended Services (obsolete 11-87); Notice of Decision (income report); Certification of Handicapping Condition; Client Admission/Level of Care Determination; Child Abuse/Neglect Report; and Adult Protection/Spouse Abuse Report. Information includes name, birth certificates, social security number, car registrations and titles, court documents, medical reports, certification of tribal membership, lien agreements, guardianship orders, activity logs, surveys, progress notes, and permanency and individual service plans.

RETENTION:

Retain 5 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 5, Item 1.

AGENCY: Department of Workforce Services. Panguitch Employment Center

SERIES: 7066

TITLE: Eligibility case files

(continued)

AUTHORIZED: 03/15/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year or until case is closed and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy provided no litigation is pending.

APPRAISAL:

Administrative Fiscal Legal

This disposition is based on 42 CFR 455.105 (1990) which specifies that these records be retained for a minimum of five years.

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Controlled. Psychiatric and psychological information

AGENCY: Department of Workforce Services. Panguitch Employment Center

SERIES: 7302

3

TITLE: Home energy assistance target program case files

DATES: ca. 1991-1997

ARRANGEMENT: None

ANNUAL ACCUMULATION:

DESCRIPTION:

These case files are created by home energy assistance target eligibility workers. The purpose of the record is to gather information to verify and determine eligibility for home energy assistance. Information gathered for verification purposes include age, employer, date of birth, marital status, name, national origin, number of children, race and ethnic grouping, salary and income information, sex, signature of client, social security number, and telephone number.

RETENTION:

Retain 5 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 5, Item 2.

AUTHORIZED: 03/19/1991

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

AGENCY: Department of Workforce Services. Panguitch Employment Center

SERIES: 7302

TITLE: Home energy assistance target program case files

(continued)

PRIMARY CLASSIFICATION:

Private